

DOMINICA

TOURISM 2010 POLICY



Ministry of Tourism
and
National Development Corporation
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Glossary of Terms

Policy Formulation Process

Dominica formed a partnership with the Canadian International Development Agency's Caribbean Project for Economic Competitiveness (CPEC) in 2000 to undertake a series of initiatives to enhance the competitiveness of Dominica's tourism sector. The preparation of a national tourism policy for Dominica has been one of the key objectives of this tourism sector collaboration. CPEC's Tourism Specialist was retained in August, 2004 to assist the Ministry of Tourism and National Development Corporation to prepare a draft policy report and facilitate the development of a national tourism policy. The Ministry and the NDC formed a Working Group comprised of public and private sector representatives to work with the Specialist and to assist in the organization of consultation meetings.

The process involved a wide range of activities including:

1. Meetings with the Working Group to discuss tourism issues and challenges.
2. More than 50 individual interviews and one-on-one consultations with stakeholders in government and the industry as well as the financial community and NGO's.
3. Secondary research including an assessment of Dominica's positioning globally and within the Caribbean.
4. Preparation of a Technical Report on Tourism Policy including recommended directions for tourism policy in Dominica, for distribution and review by all stakeholders.
5. Presentations of the Technical Report to:
 - the Working Group;
 - the Board of Directors of the National Development Corporation;
 - the Permanent Secretary's Committee;
 - Board members of the Dominica Hotel and Tourism Association (DHTA);
 - staff officers of the Dominica Aid Bank; and
 - staff of the Land Use Planning Unit.
6. A full day public forum attended by over 100 industry and government stakeholders to review and comment on the policy.

This consultation has been essential to formulate a national tourism policy that meets the aspirations and objectives for tourism in the country, ensures widespread tourism benefits, and adopts a practical approach to implementation. Those of us involved in the policy formulation process very much appreciate the time and care taken by stakeholders who provided input and comments.

One of the key findings of the consultation process has been a unanimous call for action and implementation. Accordingly, a detailed action plan to implement the policy has been developed and is found in the National Tourism Policy – Action Plan, December, 2004.

1. THE NEED FOR A NATIONAL TOURISM POLICY

Although Dominica has had a variety of tourism policies developed over the last three decades, none has been adopted as a national tourism policy. This is now recognized as a critical shortfall in the country's effort to grow its tourism sector. A national tourism policy is essential to define the vision for tourism and the direction in which the country believes its tourism sector should grow. The benefits of a national tourism policy are extensive, including:

- greater clarity for industry and government on the priorities for tourism and the desired focus for the country to grow its tourism sector in the short, medium and long term;
- greater clarity for the donor and international financial institution community, thus helping to inform the development of projects and funding programs consistent with the country's aspirations for tourism; and
- a clear signal to the regional and international tourism industry that Dominica has established tourism as a priority and is serious about its commitment to the tourism sector.

Governments worldwide are also recognizing the value of tourism as a generator of economic growth in other sectors, largely because of the contribution tourism can make to a destination's quality of life. Sustainable tourism can contribute in many ways to the overall economic health of the destination:

- through destination marketing that enhances the destination's image and awareness of the destination's export products;
- through increases in quality of life, that foster increased interest in investing in a destination in a range of economic activities;
- protection of natural, heritage and cultural resources; and
- through motivating improvements in downtown areas, waterfront development, heritage site and building retention and upgrading of national parks and protected areas.

Global awareness of these benefits has resulted in a far more competitive environment as destinations around the world seek increased market share. Hence, one sees the adoption of international standards well-matched to market expectations, market-driven approaches to developing and offering tourism experiences, and business approaches to destination management. These trends require tourism agencies today to adopt more focused approaches and a businesslike attitude to destination management.

1.1 Dominica's Economic Opportunity

Dominica has significant tourism resources. Tourism offers a comparative advantage given limited opportunities available in other economic sectors and therefore requires attention and development. But it is more than just tourism.

Tourism and other economic sectors are inextricably related. A decision to upgrade the road system has a positive influence on the tourism sector, fostering

more exploration of the country. An aggressive destination marketing campaign by Dominica increases awareness of the country, its exports, its economic opportunities and investment possibilities. Tourism expenditures at nature, heritage and cultural sites can contribute to funding for reinvestment in these sites to protect core values and enhance the visitor experience. Communities can diversify their economies by offering market-driven tourism experiences and generating visitor expenditures within their communities. A tourism product development program for local cuisine can generate increased business for local agricultural products and enhance linkages throughout the agricultural community.

Thus the motivation for investing in tourism extends beyond direct benefits in a stronger tourism sector. A vibrant tourism industry can make a major contribution to investment in Dominica by other sectors and can improve the environment for commerce generally.

1.2 The Challenge for Dominica

The overriding issue for the tourism sector and its future is the absence of a focused commitment to tourism. This is not to say the government does not recognize the importance of tourism and has not made a commitment to tourism, but rather that the commitment has not been focused to produce the desired results in terms of the expected contribution to Dominica's economy and social and cultural fabric.

Although there have been numerous tourism policies and plans developed over the last three decades, none have been adopted and all have been used only as guidelines. The lack of a competitive destination management and marketing budget, together with tourism infrastructure constraints – particularly for air access – are further evidence of this lack of commitment. In the meantime, most of Dominica's neighbours in the OECS and Caribbean generally have been developing their tourism sectors, investing in destination marketing and management, and generating economic benefits from that effort.

As a nature destination, Dominica faces considerable competition from other global destinations (e.g. the Amazon area, South Africa, New Zealand, Costa Rica, etc.). In order to compete effectively, Dominica must position its destination and its product to meet the needs and expectations of this specialty market and to select those segments within that market that the country can best offer a comparative advantage. This also includes competitive positioning within the Caribbean, where intra-regional travel is now a growing market segment that generates revenues in traditional off-season and shoulder season time periods.

In pursuing tourism sector growth, Dominica must also seek to successfully incorporate local community involvement in tourism and foster opportunities for local entrepreneurs. Sustainable tourism, that has the support of those involved in tourism, that does not compromise the country's resource base, and that is well within the capacity of the country's infrastructure must guide tourism sector growth.

Dominica has an excellent opportunity to grow its tourism sector in light of market trends in the last decade and the positive forecasts of global tourism growth for the

next ten years. The market opportunity for Dominica is excellent and its niche product is well positioned to meet the demands from those seeking experiential tourism products in the nature, adventure and culture areas. Moreover, Dominica is very well positioned to market itself as one of the last locations in which one can find "the Caribbean as it used to be".

1.3 The Policy Response – the Opportunity for Dominica

Given the history of tourism in Dominica, a new policy approach is recommended which combines policy with a call to action. The importance of the tourism sector to Dominica's economy underscores the need for a focused program to facilitate growth in the tourism sector in a manner that ensures social, economic and cultural benefits for Dominica citizens. For this reason, a "Dominica Tourism 2010" policy is recommended that is characterized by:

- a vision and policy for tourism that is based on how tourism can contribute to Dominica's social, economic and cultural needs including targets for growth;
- an orientation to sustainable tourism, with meaningful involvement of communities;
- a focus on generating widespread commitment to the tourism targets identified in the policy; and
- an emphasis on action.

A blueprint for implementation in the form of an action plan was developed as a companion report to the National Tourism Policy presented herein. It is provided under separate cover. In addition, this report is supported by the technical report prepared in September, 2004, the Dominica 2010 Tourism Policy Working Draft. This report provides the underlying technical analysis, that together with stakeholder input, forms the basis for the policy recommendations herein.

2. THE TRENDS SHAPING TOURISM POLICY

Tourism is one of the world's fastest growing sectors, forecast by the World Travel and Tourism Council (WTTC) to grow at 4.5% annually through to 2014. It generates US\$ 5.5 trillion in visitor expenditures and is an estimated 3.8% of the world GDP.¹

The global tourism industry has entered a period of robust growth, according to the WTTC². The figures released in March, 2004 show that travel and tourism has made a recovery from 9/11, the war in Iraq, SARS and the downturn in the international economy. Based on measures from 174 national economies the WTTC estimates that travel and tourism is expected to contribute 3.8% of total GDP in 2004. When the combined direct and indirect impact of the industry is taken into consideration, the contribution is 10.4%. Globally the industry is forecast to produce 3.3 million new jobs in 2004 to bring the total to 77 million or 2.8% of the total world employment. When the travel and tourism industry is examined in term of its direct and indirect impact the number of new jobs is expected to rise to almost 10 million, bringing the total to 214.7 million jobs in the world economy – 8.1% of total employment.

Global Market Trends

The global tourism growth forecast presents both opportunities and challenges for Dominica. Market trends include a significant component of the market seeking "experiential" tourism. This is regarded by such organizations as the World Tourism Organization (WTO) as one of the fastest growing for the foreseeable future. Some segments of the experiential tourism market; nature, culture and soft adventure, are all forecast by the WTO to increase by up to 20% per year over the next several years.³ All of these segments require and expect a well-managed destination that pursues sustainable development and practises environmental responsibility as well as protecting its heritage and cultural resources.

Nature-based and adventure tourism travellers select destinations based on such factors as biodiversity levels, the incidence of protected areas, destination facilities sympathetic to values around natural resource conservation and protection of resources ranging from heritage to scenic and aesthetic values. In the case of cultural tourism, the WTO's 2020 Vision report estimates that about 10% of all tourism arrivals globally are for cultural tourism purposes. Cultural tourists seek a variety of experiences from heritage and architectural tours to music festivals and performing arts activities. They purchase arts and crafts and they are interested in visiting and learning about communities and local culture. There is now growing interest in community tourism and this has spawned a variety of tour operators offering not only community tourism itself but also related products such as agratourism, rural touring and cultural tourism in a rural context. A recent market test for specialty operators in community tourism conducted for Belize found

¹ WTTC, May, 2004, The Caribbean: The Impact of Travel and Tourism on Jobs and the Economy.

² WTTC, March 11 2004, Press Release: Global travel and tourism poised for robust growth in 2004

³ World Tourism Organization, Tourism 2020 Vision, Volume 7, Global Forecasts and Profiles of Market Segments, 2001

35 operators interested in discussing business opportunities to develop this product area.⁴

The growth in these markets have resulted in expansion of the specialty tour operator and travel trade intermediary industry segments serving markets seeking experiential tourism activities around the globe.

It is positive news for Dominica since this growing market (seeking nature, heritage and cultural experiences as well as soft adventure) is well matched to Dominica's product. Dominica's nature, heritage/cultural and soft adventure tourism resources are globally competitive. Therefore a properly positioned destination vision and policy and with appropriate destination management, should be able to take advantage of this growth and increase tourism activity in the country.

More Focus on the Destination

The WTO global market forecasts implies significant changes to Caribbean tourism development approaches. Whereas the emphasis in the 20th Century was on beach resort development, in this century much more emphasis will be placed on the authentic experiences destinations can offer in the area of local culture, learning, closeness to nature, wellness and adventure. The destinations that are up to the challenge of providing high quality experiences will prevail. It will require an investment in destination infrastructure, land planning and management processes to protect the environment as well as the scenic and aesthetic resources on which tourism depends. It will also require investments in tourism information services, quality assurance programs for local ground transportation services, and community tourism development.

Marketing and the Impact of Technology

Global market changes are also affecting the manner in which destinations promote themselves and their markets. The mainstream marketing model in the Caribbean has a heavy reliance on the large resort and hotel properties driving business through their reservation systems and tour operator relationships. In this model, CTO support is instrumental in increasing effectiveness through its regional market programs including the "Doit" Caribbean web site and travel agency partnership programs.

A more recent trend is the increasing interest in experiential tourism in the last several years, facilitated by technology now available to customers, the tourism industry and destinations. Differentiated product for specific market segments can now be offered through the Internet in ways that was never before possible. Destinations can now target specific interest groups matched to their resource base and provide web portal access to assist these customers in trip planning and fulfillment. In destinations, this trend is evident in the development of new promotional techniques through web portals that provide markets with the opportunity to plan trips, make bookings not only for airlines and hotels, but also tours, and even tickets for events, theatre and sporting activities. Few destinations

⁴ Survey of candidate tour operators for the Belize Tourist Board with funding support from CPEC, 2004.

in the Caribbean have modernized web portals, particularly in small nations. Larger countries such as Jamaica have recently (2003) launched new web portals with reservation capabilities.

Increasing Competition

A modern, state of the art web site, though is not enough. In its Vision 2020 report, the WTO described a survey of national tourism agencies concerning their future destination marketing intent.⁵ Eighty-four of these agencies reported that they would be increasing their destination marketing budgets in the future to maintain or attempt to grow market share. Thus, in addition to the requirement to deliver experiential information for customers on a differentiated basis to special interest market segments, destinations must also consider the scale of expenditures they must make in order to remain competitive.

Product Quality

Product quality concerns are top of mind for all destinations competing for global tourism markets. The adoption of market-driven standards by destinations, the development of rating systems by consumer organizations, and the extraordinary growth of hotel chains and franchises all point to market demand for information on the quality of the experience and service they can expect. This trend is now moving rapidly to encompass nature, adventure, culture and heritage experiences. Market-driven, special interest guide training programs, industry code of ethics and conduct, and emerging international standards for such product segments as eco-tourism all respond to this market need. Destinations that embrace product quality standards will meet with success in the marketplace.

Export Ready Policy

The tourism sector is essentially an export sector. "Export ready" for tourism includes not only product standards but also includes "requirements" for doing business with the international travel trade. This is important for participating in international marketing programs and packaging arrangements. Destinations are now actively implementing export ready policies to define what is required on the part of their industry to do business internationally and to signal to the international travel trade what businesses in their destinations they can expect will deliver a quality product using the international procedures of engagement.

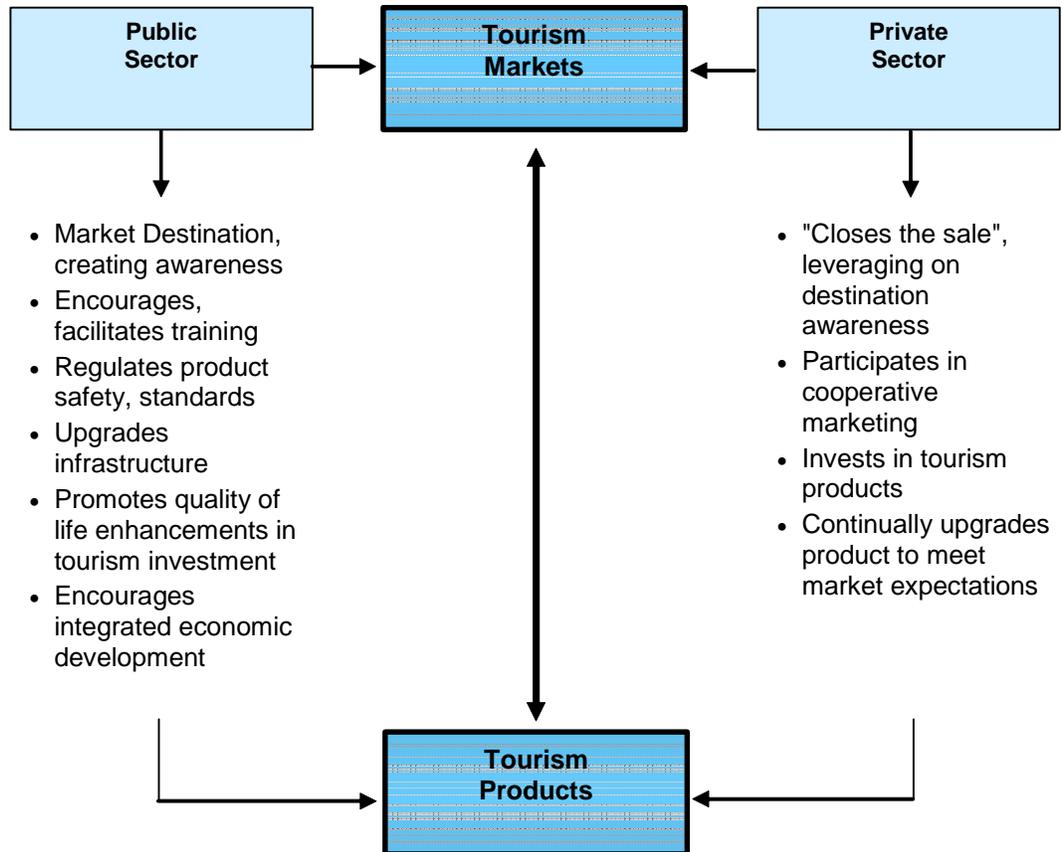
Increasing Competition and Destination Management

The application of business models to destination management is a trend that is being adopted by many destinations globally in response to competitive pressure. From a destination perspective, tourism visitor expenditures are recognized as the "revenues of the business". Managing the tourism sector as a business has all of the same considerations of a business entity ranging from delivering market/export ready products, marketing, quality control, staying ahead of the competition, running an ethical and environmentally responsible business, financing, and managing external relationships. As markets express more interest in exploring destinations, leadership from the public sector becomes increasingly important.

⁵ World Tourism Organization, Tourism 2020 Vision, 2001

Destination management involves a partnership between the public and private sectors and the role of the private sector establishes the environment and framework within which private sector investment can take place.

Exhibit 2.1: Destination Management – Partnership Model



3. TOURISM POLICY CONTEXT

Without a formal tourism policy ever adopted by Dominica, the context for considering a national tourism policy is found in the "implicit" policy decisions of government related to tourism.

3.1 The Industry's Economic Contribution

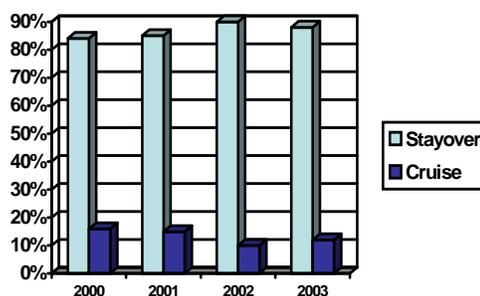
Dominica's tourism sector generated about 250,000 arrivals in 2003, of which the majority were cruise passengers (71%). Of the destination's 73,000 stayovers, about 40% of these are estimated to be visitors to paid accommodation.

Exhibit 3.1: Dominica Arrivals - 2003

	2000	2001	2002	2003
Total Stayovers	69,598	66,393	69,193	72,948
% Paid Accommodation	40%	37%	39%	39%
Excursionists	2,656	1,979	928	1,440
Cruise	239,796	207,627	136,859	177,044
Total	312,050	275,999	206,980	251,432

Source: Dominica National Development Corporation

The sector generated an estimated EC\$114 million in direct visitor expenditures in 2003. The majority was contributed by stayover visitors (88%) with the remainder by the cruise passengers (12%).



Source: Dominica National Development Foundation

3.2 Legislative Context

The tourism sector is guided by three main acts; the Hotel Aids Act, 1991, the Fiscal Incentives Act, Chapter 85:15, 1991 and the Tourism (Regulations and Standards) Act 9, 2001.

The Hotel Aids Act, 1991, provides guidance on the definition of hotels for the tourism sector. This Act provides for relief customs duties, income tax and property tax for investors constructing hotels. The definition of a "hotel" is:

*"... any building containing or intended to contain when complete not less than 10 bedrooms for the accommodation or reward of guests
....."⁶*

The Act provides for import licences, with provisions for fiscal incentives related to such licences under the Fiscal Incentives Act, and the granting of a tax holiday ranging from ten to fifteen years depending on the type of enterprise. In the case of hotels, the tax holiday may be up to twenty years.

The Tourism (Regulations and Standards) Act provides for a program of tourism standards – the Nature Island Standards of Excellence (NISE) – that is intended to enhance competitiveness and “serve as criteria by which any tourism service may be classified, rated and certified.” (Section 5 (a) of the Act). The Act provides for enforcement of the standards through a system of licensing and quality assurance. Licenses under the provisions of the Act are mandatory and are at the discretion of the Minister.

Tourism services are all subject to the Act including accommodation, transportation services, vending, tour guiding, water sports and food and beverage. The Act explicitly provides for a tourism accommodation schedule that sets a system of classification, the objectives of which are to apply international standards to accommodation facilities in Dominica.

At the present time, tourism standards are being developed by the Bureau of Standards. These enterprises must meet the standards specified to become licensed and this will form part of the regulatory environment for tourism, once implemented. It is expected that implementation will proceed over the next one to six months.

Dominica's tourism legislation has been undergone significant improvement with recent passage of the Tourism Act, providing an excellent policy framework for classification, rating and certification systems for tourism products. Weaknesses now relate more to investment incentive provisions for tourism. This is addressed as part of the recommended policy on destination management policy in this report.

3.3 Tourism Policy and Planning History

Dominica has seen a number of National Tourism Policy efforts beginning with the Shankland & Cox Tourism Development Strategy, prepared in 1971. This guided tourism in the 1970s and 1980s. In the 1990s, a number of tourism policy efforts were undertaken, including:

- in 1994 a national cruise policy for Dominica prepared by the Caribbean Tourism Organization (CTO);
- a tourism policy report on integrating conservation with eco-tourism prepared by Ecosystems Limited, 1997; and

⁶ p4, Chapter 84:04, Hotel Aids Act, Laws of the Commonwealth of Dominica.

- the preparation of a tourism development plan for Dominica prepared by Dr. Maria Bellot, 1997-2000.

The tourism development plan prepared by Dr. Bellot is probably most definitive in terms of setting out a tourism "master plan", including a recommended vision and policy for tourism. As the last major tourism planning effort, Dr. Bellot's recommendations on tourism policy provide the informal framework for tourism sector management. Although never adopted by government, representatives in both the NDC and the Ministry of Tourism point to this document as a frequently-referenced guideline for tourism.

The eco-tourism policy proposed in this development plan set the course for Dominica's market positioning as an "eco-tourism", "nature" destination. This has been the most significant element in defining Dominica's tourism orientation since that time.

3.3.1 Eco-tourism Policy

Dominica, in collaboration with the European Union, has embarked on a major eco-tourism programme embracing nature, heritage and cultural tourism product development as well as community tourism. Indeed, community tourism is one of the featured components of the EU eco-tourism programme. In addition to assistance to communities and to operators to enhance competitiveness and enter the tourism sector, a niche marketing strategy has been developed for Dominica, consistent with the directions established by this programme initiative. The eco-tourism program has evolved from Dominica's market positioning around nature tourism.

This eco-tourism programme will set the policy for Dominica in a number of areas ranging from eco-tourism to community tourism and many aspects of the country's commitment to sustainable tourism. Indeed, it has already shaped this policy report for the incorporation of the draft community tourism policies and additional outcomes from this programme are expected to update this National Tourism Policy over the next two to three years.

3.4 Budgets and Projects Shaping Policy

Two policy areas implicitly set directions for the tourism sector and provide a framework for formalizing a National Tourism Policy. These include:

- the recent (2004) budget speech by the Minister of Finance; and
- the various decisions Dominica has made concerning donor projects and programs in the last three to four years.

It is useful to review the contents and directions suggested in these two areas in considering tourism policy.

3.4.1 Dominica's Capital Budget

The recent (2004) budget speech by the Minister of Finance sets out priorities for tourism sector growth and associated capital and operating budgets. It occupies a significant portion of the budget speech and calls for tourism investment by the public sector comprising about 11% of total public sector capital spending over the

next three years. The 2004-2005 capital budget focuses on "improving critical economic infrastructure, that will send appropriate signals to attract the private investment that is necessary to continue the improvements in economic performance."⁷ The budget speech includes the following reference specifically relevant to policy:

"Government strategy on tourism will be geared at increasing revenues and employment generation. The focus will be on increasing both stayover and cruise visitor arrivals by increased investment and promotion and marketing. Complementary to increasing the number of visitors, government will develop initiatives that increase the per capita level of visitor spending. Strategies include vendor facility improvements, greater diversity in local arts and craft, the circular tour route that will be enabled by opening of the Pennville-Guillette Road in the north and Cabrits upgrading with EU funding."

3.4.2 Donor Projects and Programs

Notwithstanding the policy directions established by the 1997 Tourism Development Plan, tourism sector policy has also been implicitly shaped by decisions the country has made related to donor programs. Some of these projects are reflected in the capital budget speech discussed previously. Others are donor programs addressing tourism sector requirements in areas such as training, policy development and planning.

They respond to a variety of issues that have been cited as constraining the tourism sector and its growth. Agreement by Dominica to pursue these projects reflects implicit policy decisions on the part of government for tourism sector growth and development. The projects now underway include:

- EU – Eco-tourism Development Programme, co-funded by Gov't of Dominica;
- CIDA-funded Nature Island Standards of Excellence Phase II (CPEC project);
- Investment Opportunity Program funded by USAID and delivered by Carana Corporation;
- CIDA-funded Financial Services Project – CPEC;
- Upgrading of Eco-tourism Sites funded by CDB;
- Republic of China – Tourism Marketing and Promotion Program, co-funded by Gov't of Dominica;
- Caribbean Regional Environmental Program (CREP), funded by EU;
- Small Tourism Enterprises (STEP) Project, funded by OAS and USAID;
- USAID-funded Green Globe 21 Destination Program;
- Waitukubli National Trail Program, funded by EU;

⁷ p.19, 2004-2005 Budget Address, Government of Dominica.

- USAID-funded Caribbean Hotel Environmental Management Initiative; and
- EU Enterprise Development Fund.

The diverse projects and programs funded by donors and international financial institutions point to a real need for coordination. It can only come from a policy and objectives that define Dominica's intentions for the tourism sector and provide guidance on implementing these projects, defining the tourism interest in the capital budget, and focusing investment promotion in the tourism sector.

3.5 Related Policy Areas

There are a variety of related policy areas that influence tourism and for which greater integration is essential. In addition to economic policies discussed above (Section 3.3), they include such areas as Green Globe certification, infrastructure, community planning and cultural policy.

Green Globe Certification

Dominica has recently completed Green Globe certification for its entire country. This is a significant step towards sustainable tourism and represents an environmentally responsible benchmark that will enhance its reputation as a nature destination.

Tourism Infrastructure

The state of Dominica's tourism infrastructure is one of its most pressing constraints to tourism sector growth. Infrastructure issues, and particularly air access, are a source of concern for both local and external investors. Various tourism policies, plans and strategies have all alluded to the need for infrastructure investment and upgrading but critical shortfalls remain.

Air access is by far the most critical infrastructure constraint for Dominica's tourism sector. The tourism industry has recently encountered difficulty in attracting investment, primarily because of limited air access. Not only must Dominica rationalize its current air access situation and maximize potential from existing facilities, it must also give serious consideration in the long term to creation of an international airport facility.

Road service has also been identified as a concern by local operators as well as the international travel trade. Investment in upgrading roads can be matched with Dominica's touring product to create a unique experience for the Caribbean.

In addition to air and road service, quality marine access and marine services are also important infrastructure considerations for the tourism sector. At the present time, the ferry terminal is not designed nor managed to ensure a quality visitor experience. Guadeloupe, Martinique and St. Lucia are all important markets for marine access and enhanced visitor experiences must be offered to maintain and strengthen these markets. The Port Authority has developed improvement plans to enhance the customer's experience at the port. These will be supported in part by the EU Eco-Tourism Development Programme.

Land Use Planning

A preliminary land use plan will be undertaken with EU funding support in 2005. This provides an opportunity for the tourism sector to collaborate with land use planners to ensure that tourism interests are taken into account. At the present time, there is an absence of tourism policies that relate to the physical development of the country, and to the quality of the destination from a tourism perspective. These include the impact of land use activities such as quarrying and road construction on scenic views (particularly along the coastline), the growing incidents of uncoordinated signage and billboard installation that compromise the visual beauty of the country, land use conflicts, and the need for more attention to heritage protection.

4. DOMINICA TOURISM 2010 POLICY- VISION AND OBJECTIVES

4.1 The Vision for Tourism

The suggested vision for tourism builds on the 1997 vision recommended by Dr. Bellot, refined to reflect today's global tourism market and the potential tourism offers to enhance quality of life in destinations.

Dominica will pursue sustainable tourism that enriches the lives of all citizens by creating economic, social and cultural opportunities, protecting the natural resources and scenic, heritage and cultural features of the country, nurturing community involvement in tourism at sustainable levels, and by creating career paths for the young people of Dominica.

4.2 Guiding Principles

Dominica will be guided by several principles to shape how tourism is developed and managed the tourism sector to achieve the country's vision for tourism. These guiding principles are as follows:

1. Tourism policy and development programs will be integrated with national economic, social and cultural policy.
2. Government will foster a positive environment for the tourism sector and for meaningful local participation in the sector.
3. Tourism sector planning and management will be based on partnerships and collaboration.
4. Local communities will play a meaningful role in the tourism sector, one that ensures economic, social and cultural benefits to each participating community.
5. All tourism activity will be designed to improve the quality of life enjoyed by Dominica's citizens.
6. Development of the tourism sector will be market-driven.
7. Government will adopt a business model to fulfill their role in tourism sector management – that of destination management.
8. Tourism activity will be private sector-driven.
9. Tourism policies, program and standards will be integrated with the principles and directions required of the tourism sector arising from Green Globe certification

4.3 Tourism Sector Objectives

Growth Objectives

It is important to establish growth objectives for the tourism sector in order to provide a focus for destination management. In light of the robust market, a relatively small tourism sector (particularly the export ready component), and the impending improvements in air and road infrastructure, a target of doubling expenditures by both stayover and cruise arrivals is realistic. In the case of cruise

arrivals, this should only be pursued if the majority of new cruise business can be directed to the Portsmouth area, thereby helping to contribute revenue generation for new attractions development. In terms of contribution to the economy, figures are not available for the economic impact of tourism in Dominica. Therefore tourism sector growth objectives are expressed in direct expenditures by visitors.

The 2010 target for tourism is direct expenditures by visitors of EC\$227 million with a EC\$200 million annual contribution by stayover market and EC\$27 million by cruise arrivals.

Market Segment	Current (2003) Expenditures (\$EC)	% of Total	2010 Target (\$EC)
Stayover	\$100.5 million	88%	\$200 million
Cruise Arrivals	\$13.5 million	12%	\$27 million
Total	\$114 million	100%	\$227 million

Sustainable Tourism Objectives

Tourism, in order to be sustainable, must contribute to social, heritage and cultural, and environmental management aspirations of the nation.

Sustainable tourism objectives are as follows:

Contribution by Tourism To:	Objectives
Social and Economic Benefits	<ul style="list-style-type: none"> • Creation of job and business opportunities in tourism, and through enhanced linkages, in agriculture, arts and crafts, entertainment and music, and services sectors; • Widespread involvement of communities in the tourism sector including community resource management; and • Creation of career paths for Dominica's youth to enter the tourism sector.
Heritage/Cultural Protection	<ul style="list-style-type: none"> • Protection of heritage and cultural resources throughout Dominica with particular attention on community-based resources; • Incorporation of heritage interpretive programs into the tourism product mix including Roseau, Dominica water mills, and other features of Dominica heritage; • Incorporation of community based heritage and cultural products into scenic parkway programs; • Generation of tourism revenues for Dominica's cultural enterprises and groups; and • Fostering of pride in, and support for, Dominica's culture.
Environmental Management	<ul style="list-style-type: none"> • Enhanced commitment to Dominica's nature resources including completion of the Green Globe certification; • Enhanced interpretive programs at nature sites; • Development of scenic viewscape protection policies for Dominica's coastline routes; and • Land use policies that protect Dominica's environment, important viewscales, scenic corridors and the intimate feel of the destination as "the Caribbean as it used to be".

5. PRODUCT DEVELOPMENT POLICY

5.1 Re-position Dominica

The "nature island" destination positioning is limited, given the competitive adventure and cultural tourism product experiences offered by Dominica. Re-positioning is necessary to introduce more active activities catering to the growing experiential market and to highlight the culture of Dominica as a welcoming, hospitable and diverse Caribbean culture that will enhance the customer experience. Dominica will re-position its tourism sector to expand market positioning from a nature destination to one that encompasses adventure and cultural tourism.

In doing so, Dominica will seek the advice of specialist branding and promotion experts and will test the re-positioning through focus groups within key markets.

5.2 Tourism Development Priorities

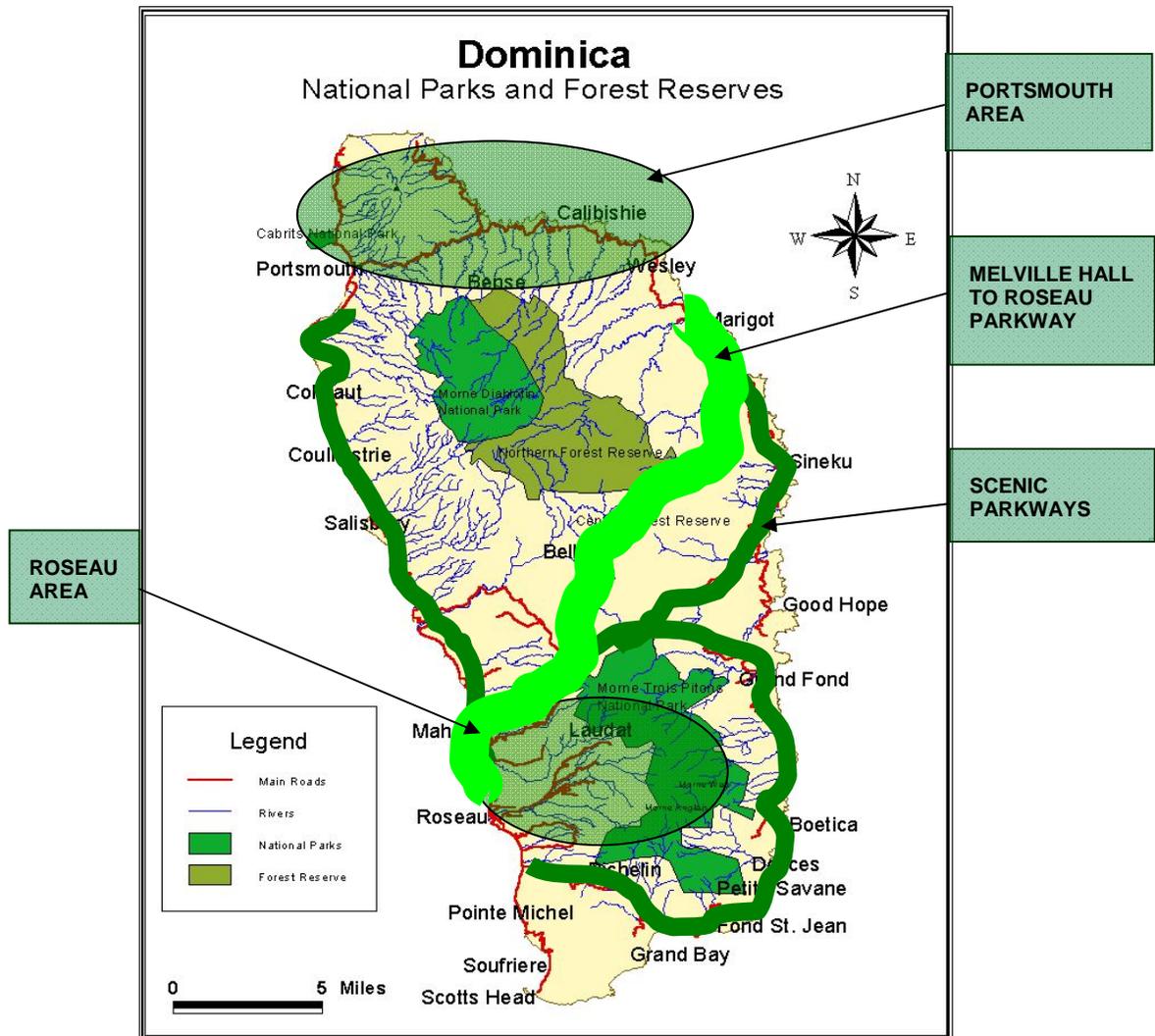
Area Priorities

The recommended tourism development priorities for Dominica focus on existing tourism activities in the Roseau and Roseau Valley area, the Portsmouth area and its excellent tourism potential, and scenic routes linking these priority areas on the east, south and west coasts. These areas are illustrated in Exhibit 5.1

Dominica will emphasize tourism development activity and align its support for tourism to reflect the tourism development priorities shown in Exhibit 5.1. More specifically, Dominica will designate the following as priority areas for tourism sector development, infrastructure development and positioning and marketing campaigns:

- a. Roseau area, where the greatest concentration of internationally competitive tourism attractions are located, including the World Heritage Site.
- b. Roseau itself as the capital city and home to the greatest concentration of heritage buildings in the country along with waterfront areas, tourism services and a variety of amenities.
- c. The Portsmouth area, where more attractions development should take place to accommodate cruise arrivals, visiting yachts and increased stayovers facilities.
- d. The Melville Hall to Roseau corridor, as a tourism attraction in its own right in the form of a parkway with interpretation of the central forest reserve, rest stops/viewing/photography pull-offs, and locations for food and beverage/craft purchases and interpretive experiences.

Exhibit 5.1: Tourism Development Priorities – A Framework for Implementation



- e. Scenic parkway designations for coastal roads enhancing coastal area touring, including the Carib territory, the Southeast, and the West coasts, all where specialty lodges, adventure and cultural tourism product experiences should be enhanced.

Tourism Standards

Under the provisions of the NISE Program, Dominica has engaged the Bureau of Standards in the development of tourism standards and certification processes. This is designed to foster market-driven tourism standards at all times and to ensure that minimum standards are met by all tourism suppliers. The national tourism agency will develop and manage a certification and inspection system for this purpose, pursuant to the Tourism (Standards and Regulations) Act.

Export Ready Policy

Dominica recognizes that tourism is an export sector. The export ready concept is based on ensuring that products offered on the international market meet the business requirements for doing business with the international travel trade and international customers. Therefore, in addition to these market-driven standards, adoption of an export ready product standard will be implemented that ensures international market acceptance of its product and enhances the capacity of Dominica's tourism suppliers to do business internationally. Such a policy is important for Dominica to pursue, given the emphasis that will be placed in the short term on developing a strong relationship with international specialty tour operators.

Dominica will focus its destination marketing around its export ready product (accommodation, tours, attractions). Government will implement programs to assist businesses to become export ready as quickly as possible to ensure their participation in destination marketing.

Priority on Stayover Market

Dominica will emphasize the development of the stayover market (both those in paid accommodation and VFRs). In so doing, a program will be designed and implemented to; (1) upgrade existing rooms where possible to export ready status, and (2) establish an effective investment promotion initiative to add new accommodation facilities in Dominica to meet the tourism policy objectives.

Cruise Market

Dominica will ensure that it remains a competitive cruise destination and will continue to encourage a balanced distribution of cruise arrivals between Roseau and Portsmouth to reduce capacity issues around Roseau and its nearby attractions.

Dominica will foster a cruise market that is matched as closely as possible to Dominica's product strengths, and a market that is encouraged to visit Dominica in the future as stayover customers. Government will review the management of the cruise passenger experience during their visit on land in Dominica to determine where the visitor experience can be improved while encouraging increased spending.

Attractions

Within the context of the development priorities, Dominica will enhance and strengthen existing tourism attractions as a matter of priority before proceeding with extensive new attractions. It will proceed with new attractions only where it is consistent with the national tourism priority niche markets of Dominica, and where there is adequate management capacity. Pursuant to this policy, priorities include:

- a. the tourism attractions managed by the public sector (the Ministry of Tourism and National Parks),
- b. resolving management of these sites including transferring authority for all sites to the Parks unit,

- c. developing and implementing a business model for public sector attractions management, including market-driven fee structures, product quality control, and cooperative marketing with the NDC.

It is important to ensure that public sector tourism attractions are marketed, managed and maintained consistent with global best practices and that the visitor experience including access, hospitality services and interpretive programs is among the best in the world. This approach recognizes Dominica's internationally competitive nature, heritage and cultural resources. It also recognizes the reality that management of such resources to protect their values on the one hand and offer an outstanding visitor experience on the other must be undertaken in order to achieve success.

Niche Markets

Dominica will continue to develop niche markets and prioritize these according to the overall priorities for Dominica's tourism sector.

- a. build on the success of the dive, adventure and nature niche markets and fostering their expansion;
- b. enhance the development of adventure tourism products throughout Dominica, including consideration for specialty adventure products such as camping, tent platform lodges and similar facilities;
- c. developing a vibrant community tourism product consistent with the policy directions established in this report;
- d. facilitate the development of a yachting segment, focusing on Portsmouth;
- e. enhance cultural tourism including festivals, villages feasts, and local cuisine experiences;
- f. develop the health tourism potential including spa and wellness facilities;
- g. strengthen and develop product in the sports tourism and agri-tourism areas; and
- h. pursue the potential for another major travel generator such as golf for Dominica, in the Portsmouth area.

In developing these product areas for the stayover and cruise markets, consideration will also be given to the day visitor, visitors arriving by ferry or yacht, and the domestic market.

Touring and Related Specialty Niche Markets

In addition to those niche markets above, Dominica will pursue the development of touring markets for those segments interested in exploring the destination, either as part of packaged tours, independently using rental vehicles, and/or bicycling and walking tours. The rich diversity of Dominica's natural and scenic resources,

together with its fascinating villages and communities, places the country at the forefront of scenic and cultural touring in the Caribbean. The adoption of parkway systems for the road network (see the policies on strengthening tourism infrastructure in Chapter 6) will enable a specialty tour product for Dominica that will stand out in the region.

The touring infrastructure developed for the tourism sector will also enable specialty products. For example, Dominica has excellent potential for the development of mountain biking specialty products both for touring and in combination with trail systems, adventure tourism products. Dominica will also pursue special events related to the biking sector (e.g. road races, mountain biking off-road trails, etc.).

Roseau Development

Dominica will place a priority on fostering the development of Roseau as a significant tourism experience combining heritage, culture and city experiences. In so doing, consideration will be given to enhancing an understanding of, and appreciation for, the Roseau heritage district, introducing themed signage, developing walking tours, ensuring that the road re-instatement project does not compromise the historic "feel" of the community, and upgrading the waterfront to a more user friendly environment with a world-class waterfront walkway area.

A visitor-friendly Roseau should also include provision for access to the river system (e.g. riverside walkways and bicycle trails) and provision for a safer night time experience for dining and entertainment activities. For example, improved night time lighting should be considered in Roseau and its outskirts. Doing so will not only improve the visitor experience but the quality of life for residents in these areas.

Pursuant to this policy, Dominica will encourage the creation of a Roseau merchants association with which to partner on the development of restaurant, entertainment and food and beverage and shopping guides for Roseau, including opening hours, specialty restaurants (particularly those offering local cuisine).

Community Tourism Policy

Community tourism is regarded as a significant tourism product development potential for Dominica and one that fosters benefits for communities, when implemented in a sensitive and inclusive manner. It is consistent with the vision and aspirations of Dominican citizens for their tourism sector and is a priority of the national tourism policy.

A community tourism policy was prepared by the EU Eco-tourism Development Program and subjected to wide review. This policy forms an important part of Dominica's national tourism policy and is as follows:

- actively open up opportunities for rural communities, local people and the informal sector to increase their involvement in the tourism industry, particularly in tourism planning and the running of enterprises;

- ensure that rural communities, local people and the informal sector have greater access to the benefits from tourism on their land, by creating appropriate legal mechanisms and establishing appropriate incentives;
- ensure that development of tourism state land takes place in areas and in forms acceptable to local people;
- encourage the formal tourism sector to co-operate and work with the informal sector, and to recognize that as well as being in the long-term self-interest of the tourism industry, this is a social responsibility and contribution to Dominica's national development objectives of improved equity, poverty alleviation, and sustainable growth; and
- ensure that tourism development within Dominica is environmentally sustainable.

Guiding Principles

1. The needs and aspirations of rural communities, local people and the informal sector, must be pro-actively incorporated into tourism legislation and regulations.
2. Tourism regulations and legislation must avoid prescribing forms of involvement in tourism by rural communities, local people and the informal sector, and rather create a supportive and enabling legal framework.
3. The Ministry of Tourism and tourism industry should work actively to increase the representation of the informal tourism sector and community interests in existing and future tourism fora.
4. Private sector tourism enterprises on state owned land should involve and benefit local residents, and provide incentives for conservation to those that bear the costs of environment, resources and tourism, to the maximum extent possible within financial and institutional constraints.

In implementation of this policy, priorities will be given to the following activities:

- Development of an inventory of cultural product experiences and work with communities and enterprises to strengthen the cultural product and its accessibility by tourists.
- Preparation of a guide to cultural tourism product, and amenities such as restaurants serving local cuisine throughout Dominica. Ensure that information on hours of operation, event times, driving distances, and contact numbers are all included in the guide.

Domestic Tourism

Dominica will develop a domestic tourism program for Dominica residents, recognizing, for example, that 25% of all visits to public sector attractions in Dominica are by residents of Dominica. Although relatively small, this market can provide an important source of revenue for the many community-based tourism attractions (for example, located along scenic parkways) throughout Dominica.

5.3 Environment Responsibility

Dominica is far more advanced than most destinations in pursuing environmental protection through a significant national parks and protected areas program and the Green Globe designation. This progress needs to be matched by environmental practices of private sector operators.

Dominica will encourage the application of environmental walk-through and related programs to increase awareness and foster implementation of sound environmental practices by private sector operators. This will include consideration of energy alternatives where feasible and where such alternatives do not compromise national interest and present environmental concerns.

6. POLICY ON STRENGTHENING TOURISM INFRASTRUCTURE

The state of Dominica's infrastructure – particularly air and marine access and the road system – compromises the potential for growth in the tourism sector. There are already projects underway to address the constraint imposed by air access and roadways. As a matter of policy, Dominica will place a priority on continually improving air and marine access and on transforming the country's road systems into touring opportunities to strengthen Dominica's tourism product.

A problem often overlooked in the Caribbean is the provision of easily accessible and understandable tourism information for visitors already in the country. This is particularly important for Dominica as its product is one that invites exploring and touring. Tourism information centres as well as improved signage are both important areas and require attention in Dominica's national tourism policy.

Air Access

Dominica will place the highest priority on enhancing air access to the country, recognizing the improvements in this area are essential to grow the tourism sector. In the immediate term, Dominica will pursue this priority through the following actions:

- a. adjust the Melville Hall airport upgrading project to install night lighting and lengthen the runway as required as a matter of priority and in parallel with or before terminal construction,
- b. fix the deadline date for completion of the airport access project (both lighting and terminal upgrading) to provide certainty to the tourism sector and potential investors,
- c. initiate discussions with airline suppliers to Dominica to announce the Melville Hall dates, introduce the tourism policy, and commence discussions on enhancing air access consistent with Dominica's tourism policy.

In the longer term, Dominica will work with the tourism industry to pursue an international airport providing jet access. Such an approach is regarded by Dominica as essential to attract significant investment in tourism sector projects as well as in other economic sectors. In pursuing international air access facilities, Dominica will seek to establish an appropriate public-private sector partnership and financing package for implementation.

Parkway System

Dominica will ensure that the proposed two-lane roadway between Melville Hall and Roseau is financed as a matter of priority and completed, preferably at the time of, or as close as possible to, the opening date for the Melville Hall airport. Pursuant to this policy, the roadway upgrading will be reviewed to enhance its development as a national Dominica "parkway" consistent with the national tourism product development policy in Section 5 above.

A comprehensive upgrading of the Dominica road system will be pursued that will foster greater exploration of Dominica's many attractions and communities as well as scenic parkways as follows:

- a. upgrading the road system in the tourism priority areas as a matter of first priority;
- b. ensuring that upgrading retains the "intimate" feel of the travel way through forested areas;
- c. incorporating a comprehensive themed signage program;
- d. in the signage program, providing for identification of parks and reserves, scenic viewing points, communities and villages, attractions and cultural tourism products;
- e. developing lay-bys at selected viewing points; and
- f. establishing a Dominica touring map for visitors.

Marine Infrastructure

Dominica will seek to capitalize on the potential that its strategic location related to marine access from Guadeloupe, Martinique, St. Lucia to Dominica offers for tourism activity and packaging multi-country tourism vacations. Pursuant to this policy, Dominica will place a priority on upgrading marine access facilities including the creation of a welcoming arrival facility at the ferry terminal that meets international market expectations.

In the Portsmouth area, Dominica will develop and implement a marine infrastructure facilities plan to support existing marine tourism activities and the creation of a yachting sector to diversify Dominica's tourism economy in this area.

Tourism Information

Dominica will place a priority on the provision of tourism information at strategic locations in Roseau and Portsmouth as well as through hotels, the Dominica Hotel and Tourism Association, and at visitor access points (airport and marine facilities). In addition, this information will be available for downloading by visitors before they leave for their vacations and by visitors who are already on-island. The tourism information will provide well-organized information and Roseau and Portsmouth restaurants and entertainment facilities including:

- types of cuisine and hours of operation;
- authentic Dominica arts and crafts including where to purchase and what to ask;
- restaurants and food and beverage facilities in communities throughout Dominica (for the exploring visitor); and
- demonstration products related to traditional activities of Dominican communities.

7. POLICY ON DESTINATION MANAGEMENT

National governments have an important destination management role in the tourism sector. This includes promoting the destination, facilitating investment in tourism consistent with the national vision for tourism, ensuring an enabling environment for human resources development, monitoring tourism sector performance and providing performance and competitive data, and ensuring integration with government policies and economic, cultural, transportation, physical planning, heritage resource protection, natural resource protection, and others.

Policies to guide Dominica's destination management activities are set out below. It is important to recognize that destination management will be undertaken as a partnership between the public and private sectors.

Destination Marketing Policy

The following policies will guide Dominica's destination marketing program.

1. Adoption of a market-driven orientation to destination marketing, including the maintenance of performance indicators and a monitoring system, market research in priority market segments and locations, and a market intelligence function.
2. In the marketing program, a focus on marketing export ready products to both international and regional markets. This policy will be supported by the following actions:
 - a. developing stronger relationships with the international travel trade and facilitating tour operator business with Dominica's market ready products;
 - b. developing a "budget" marketing strategy for those products that are not export ready, while working with them to achieve export ready status;
 - c. incorporation of the Niche Marketing strategy prepared through the Eco-Tourism Development Programme into the national destination marketing program as appropriate;
 - d. implementing an aggressive campaign for the next two to three years to bring in potential tour operators (pre-qualified through market research and market intelligence), and the media, travel writers to enhance Dominica's profile internationally; and
 - e. establishing an awareness program for the Dominica tourism industry concerning export ready product.

Investment Promotion Policy

Dominica will align its investment promotion approach to be fully consistent with this national tourism policy. In so doing, it will take into account tourism priorities by type of tourism investment and priority areas, the need to enhance

transparency in the application of investment incentives, and the need to address investor risk related to air access and tourism infrastructure. Specific considerations will include:

1. In concert with the restructuring of the NDC, refocus the investment promotion function with the following operating guidelines:
 - a. an emphasis on attracting investment consistent with Dominica's national tourism policy and, specifically, investment for new rooms at existing hotels or new hotel development, resolving investment issues related to upgrading existing rooms to market ready status in Dominica where appropriate, and attracting investment for nature, adventure, community and cultural tourism experiences; and
 - b. develop specific investment promotion strategies pursuant to the National Tourism Policy for the following areas
 - i. Portsmouth
 - ii. Roseau and the Roseau Valley area
 - iii. The proposed scenic parkway routes, prioritized by the timing of road upgrading for each.
2. Transfer the investment incentives program to an appropriate unit within the Ministry of Finance, and convert the incentives program to a transparent, rules-based system, providing for the lifting of restrictions on the lifespan of concessions, and generally a more aggressive stance towards concessions consistent with the need to foster investment and grow the tourism sector.
3. Foster a more investment friendly environment for local investors including training and awareness programs on the requirements to secure financing.
4. Develop a communications program that provides regular information updates on Dominica's tourism sector to potential investors and the tourism industry generally in the Caribbean and internationally.
5. Strengthen the advocacy service to government on behalf of qualified potential investors to facilitate approval and permit processing.

Policy on Tourism Awareness Programs

Dominica will continue to strengthen its tourism awareness programs and give particular priority to tourism awareness program delivery at the community level throughout the country.

Pursuant to this policy, a comprehensive program of tourism awareness will be implemented, consistent with the Tourism 2010 theme, and in implementing the policy consideration will be given to the following elements:

- public awareness programs including "Tourism Week" events each fall;
- industry awareness programs, particularly related to market and product trends influencing Caribbean and Dominican tourism;

- a program targeted to government and the financial/business sector related to tourism and fostering linkages throughout the economy; and
- the introduction of tourism curriculum to the school system, modelled after best practices suggested by such organizations as the Caribbean Tourism Organization.

In addition to these initiatives, a comprehensive media and communications program will be developed and implemented annually as a normal part of the programming for the tourism agency. This includes the maintenance of a Dominica tourism news web site and regular press releases for the Dominica media.

Human Resources Development Policy

Dominica will develop a comprehensive approach to human resources development in the tourism sector, including a partnership with the Dominica State College for training program delivery and the delivery of skills training as part of Dominica's effort to provide an internationally competitive tourism product. Dominica will modernize its approach to training for both skills needs by the existing industry and career path training for young people interested in tourism as a career.

Human resources development in the tourism sector has, to date, depended largely on donor programs. For example, recent skills based training in the hotel sector has been funded by the Canadian International Development Agency (CIDA) Caribbean Regional Human Resource Development Program for Economic Competitiveness (CPEC) and Organization of American States (OAS) Small Tourism Enterprise Program (STEP). It is critical that Dominica rationalize human resources development in the tourism sector as a matter of policy. The recommended initiatives include:

- initiating discussions with the OAS on delivery on the Skills for Success (small hotels) training program through the Dominica State College;
- funding delivery of the Tour Guide program through the Dominica State College and enhancing the program with best practices from recent initiatives such as the aerial tram guide training program; and
- developing a comprehensive menu of training programs for industry consistent with the product development and destination management priorities of this National Tourism Policy.

Crime Reduction Policy

The increasing incidence of crime is having a negative affect on tourism sector growth potential and can seriously jeopardize investments by government and the private sector in infrastructure, facilities and programs. Therefore it is imperative to develop an initiative on addressing the crime problem that includes both short-term action and a longer term, sustainable approach to crime reduction.

Dominica will work to enhance visitor security and reduce the impacts of crime on the tourism sector. In so doing, government will foster a partnership of all

stakeholders in the industry as well as communities, the police and the judiciary to develop effective initiatives for crime reduction.

Pursuant to this policy, government will convene a conference of tourism industry, government, the judiciary, police, and legal community on the development of a crime reduction initiative that includes consideration of the following program ideas:

- institutionalization of tourism curricula in public school levels, to enhance awareness at younger ages;
- increasing the response time and penalties for crime events on the part of the police and judiciary;
- developing a stronger partnership with the police force on placing of key tourism attractions, including programs such as "local community watches"; and
- public relations program responses for crime events targeted to Dominica's key markets as appropriate.

Cultural Tourism Policy

Dominica will ensure that its tourism and cultural policies are complementary and mutually supportive. Pursuant to the national vision for tourism and the repositioning of Dominica as a nature, adventure and cultural tourism destination, Dominica will foster the development of cultural tourism products and experiences. Specific initiatives include:

1. Alignment of the proposed National Tourism Policy with Dominica's cultural policy framework to ensure complementarity and consistency.
2. A partnership with the cultural community (both government, NGO and private sector) to identify cultural tourism product development initiatives for consideration by the NDC and by the private sector.
3. A special working group of government and cultural tourism stakeholders to work with communities to identify cultural tourism products for the proposed scenic parkways throughout Dominica. This includes both community-based tourism products and cultural experiences such as roadside fruit stands, and roadside restaurants/bars.
4. An enhanced calendar of cultural events and plan the addition of new events including community-based events as demand dictates and in parallel with growth of the tourism sector.
5. A special cultural program for Roseau that features everything cultural from Roseau's heritage to its local cuisine, specialty bakeries, arts, crafts music, performing arts and other entertainment.

The Role of Tourism in Land Use Planning Policies

Dominica will ensure that physical planning policies developed during the outline physical plan preparation in 2005 are integrated with and support the implementation of this national tourism policy.

Recognizing the importance of this plan to guide all future land use development, it shall be government policy to:

1. Ensure that the plan is positioned as a physical development plan for approval by Dominica (not as an outline plan that may never see approval).
2. Ensure that the planning process includes provision for a tourism development "plan within the plan", providing a land use policy framework that both guides the growth of the tourism sector and protects Dominica's natural, heritage and cultural resources for future generations and as assets for tourism enterprises (both public and private sector).

Recognizing also that the land use plan will take a year or more to prepare, Dominica will develop and adopt a series of tourism-related planning policies at this time. Government believes that this is important to alert the investment and development community to the directions that Dominica is taking in physical planning as it relates to tourism. It is recognized that these are broad policies and will be detailed as part of the physical development plan.

The recommended policy areas are set out below:

1. Use the tourism development priorities as a guide in consideration applications for development and discussing investment possibilities with potential investors.
2. Develop comprehensive policies on viewsapes for all touring routes in Dominica, with particular emphasis on coastal routes.
3. Develop a policy on quarry development.
4. Develop a signage policy taking into account impact on aesthetics throughout the country.
5. Formally adopt the Roseau Heritage District Plan.

It is recognized that these are preliminary policies and will be detailed as part of the preparation of the physical development plan in 2005. In the meantime, however, it is important to protect critical characteristics of Dominica's destination quality and guide tourism development and activity.

Heritage Protection Policies

The tourism sector in Dominica is dependent on a responsible approach to maintaining and protecting the country's heritage and cultural resources. Cultural experiences for visitors are expected to be a continuing highlight of their trip to Dominica and it is in the national interest to ensure full integration between the tourism vision and the national vision for heritage and cultural protection.

Government regards the heritage and cultural resources of the country as important components of Dominica's destination appeal. Accordingly, government will foster coordination between the tourism sector and those involved in heritage protection to identify tourism interests, ensure collaboration between government, property owners and heritage NGOs and facilitate the development of heritage tourism products including interpretive and guided tour activities.

Disaster Preparedness

Recognizing the annual potential for weather-related tourism sector disasters, Dominica will develop a disaster preparedness program for its tourism sector that it can apply when necessary to reduce the scope and the extent of negative impacts from such disasters. This will be developed in collaboration with emergency preparedness authorities.

8. ORGANIZING TO IMPLEMENT THE NATIONAL TOURISM POLICY

In order for Dominica to meet its vision and objective for tourism, an organizational structure is required that accomplishes two mandates:

1. Strengthen tourism sector organizations and build appropriate coordination mechanisms across all sectors of government and society.
2. Modernize tourism destination management to ensure that Dominica takes its place as a globally competitive tourism destination.

8.1 Who Should be Involved

Tourism in all destinations worldwide touches on the lives of all citizens. Each group within society, in addition to the roles of government agencies in the private sector, also has a role to play. It will be government's responsibility to ensure that all stakeholders have a voice in the challenge involved in growing the tourism sector and that all facets of society receive benefits from tourism.

The roles of stakeholders are summarized below.

Stakeholder	Role
National Government	<ul style="list-style-type: none"> • Tourism policy and planning • Providing an appropriate enabling environment for tourism including legislation, regulations • Destination marketing • Tourism product standards • Coordination and integration with government processes including economic policy development and planning, capital budgeting, land use planning, resource protection, cultural protection
Tourism Private Sector	<ul style="list-style-type: none"> • Invest in the tourism sector. • Operate and manage plant efficiently and profitably • Advertise and promote • Upgrade skills of workforce • Continuously refurbish plant/equipment • Satisfy customer needs • Collaborate with the government in planning promoting and marketing • Involve local communities • Operate according to appropriate standards
Local Government, Communities	<ul style="list-style-type: none"> • Organize to take advantage of tourism opportunities • Work with national government in the private sector to develop tourism products • Respond to tourism in a way that enhances quality of life within the community and ensures that there are direct benefits to the community • Develop roles in tourism activities that do not compromise the heritage and culture of the community • Adopt environmental management practices
Non-Tourism Government Agencies	<ul style="list-style-type: none"> • Incorporate and reflect the vision for tourism, tourism sector objectives and the national tourism policy in the

Stakeholder	Role
	plans and activities of agencies <ul style="list-style-type: none"> • Participate in coordinating activities with the national tourism agency • Ensure that the tourism interest is always addressed in policy and planning.
Media	<ul style="list-style-type: none"> • Awareness building • Fostering positive attitude towards tourism and positive image of destination • Professional approach to tourism sector issues, incidents • Information sharing
NGOs/Civil Society	<ul style="list-style-type: none"> • Including special interest groups (eg, heritage, environment), labour, women, youth • Mobilization • Awareness building • Asset identification • Information sharing • Facilitating partnerships

8.2 Organizational Structure to Implement the Tourism Policy

The organizational structure to implement Dominica's national tourism policy is illustrated in Exhibit 8.1 and discussed below. It includes provision for:

- a modernized destination management agency approach; and
- a short term (3 to 5 year) tourism task force to oversee implementation of national tourism policy through a tourism action plan.

The elements of the organizational structure are described below.

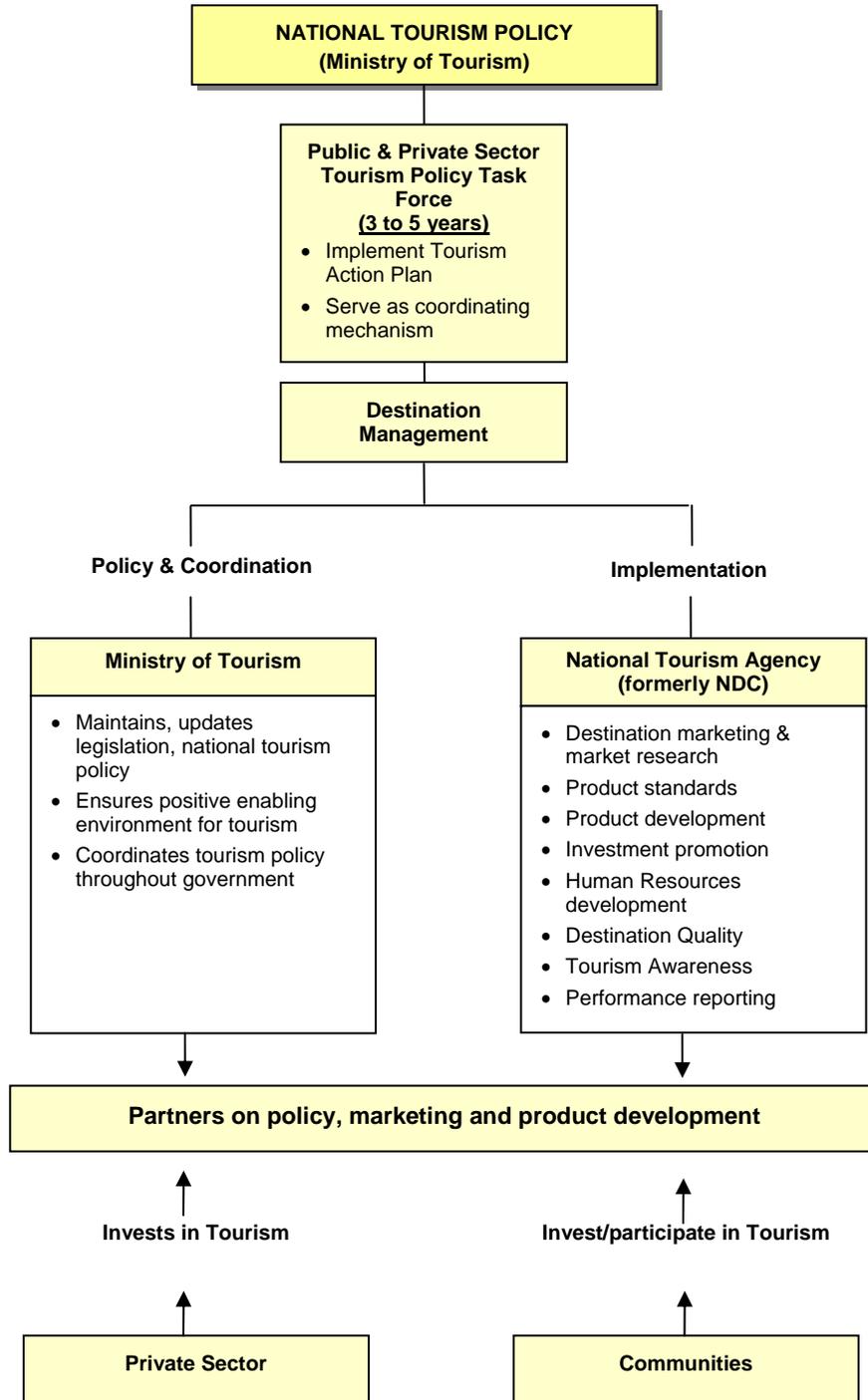
8.2.1 The Policy and Implementation Roles of Government

Effective destination management requires government to ensure a positive enabling environment for tourism together with an implementation mechanism for a national tourism policy. Typically, there is a clear distinction between a "Ministry of Tourism" function and the creation of a national tourism agency for policy implementation. The Ministry of Tourism function is concerned with ensuring that the public interest as it relates to tourism sector growth and development is protected. Accordingly, the Ministry maintains and updates legislation as well as the national tourism policy, and ensures coordination with other agencies throughout government.

The national tourism agency is usually set up as a quasi public-private sector agency with government financing but with private sector participation on the board. It implements policy through destination marketing, product development, human resources development and performance reporting programs.

The overall structure is illustrated in Exhibit 8.1.

Exhibit 8.1: Organizational Structure to Implement the National Tourism Policy



8.2.2 The Special Case of Dominica's Public Sector Attractions

In Dominica, special circumstances prevail given the importance of Dominica's environment and natural attractions to the health of the tourism sector. At the present time, the Ministry of Tourism is involved in attractions management – a function it is negotiating to transfer to the Ministry of Agriculture and Environment, Parks Division. This transfer will enable single management of the natural attractions owned by the public sector.

8.2.3 The Role of Government Agencies

The involvement of government agencies in the tourism sector is extensive and summarized in the table below.

Government Agency	Area of Involvement
Ministry of Tourism, Ports & Employment	<ul style="list-style-type: none"> • Tourism Policy, Ports
National Development Corporation	<ul style="list-style-type: none"> • Destination management and marketing
Ministry of Finance	<ul style="list-style-type: none"> • Economic development policy • Capital and operations budgeting • Investment incentives • Tourism sector performance statistics
Ministry of Agriculture & the Environment	<ul style="list-style-type: none"> • Agricultural tourism linkages • Parks, public sector attractions • Environmental Management
Ministry of Communications, Works, Housing & Physical Planning	<ul style="list-style-type: none"> • Land use planning • Melville Hall to Roseau upgrade • Roseau road reinstatement • Road system
Ministry of Foreign Affairs, Trade & Marketing	<ul style="list-style-type: none"> • Trade linkages
Ministry of Community Development, Gender Affairs & Information	<ul style="list-style-type: none"> • Community tourism programs, cultural tourism
Ministry of Education, Sport, Youth Affairs	<ul style="list-style-type: none"> • Training at all school levels, public awareness of tourism
Public and Police Service Commission	<ul style="list-style-type: none"> • Safety and security

8.2.4 Tourism Task Force

A high level tourism task force will be established to oversee the mobilization effort to implement the tourism policy. This task force is necessitated by the need to strengthen the public-private partnership and to collaborate on capacity building for the tourism agencies that are most directly involved in tourism; specifically the NDC, Ministry of Tourism, Parks Division of the Ministry of Agriculture, and the Ministry of Communications, Works, Housing and Physical Planning, Planning Division. The task force would include Cabinet representation from the Prime Minister and Minister of Tourism together with senior and respective representatives from the private sector and public agency representatives including the Permanent Secretary of Tourism, Director of Tourism and representatives of

the Ministry of Finance, National Authorizing Office (NAO) and NDC. Key government staff should also be available as ex-officio members to assist the task force. These include:

- Chief Technical Officer of Ministry of Tourism
- Director of Parks
- Chief Technical Officer of the Ministry of Communications;
- Chief Land Use Planner; and
- Director of the NAO office.

It is important to keep the task force relatively small to facilitate an action orientation. This high-level task force can and should establish sub-committees from time to time to provide input on specific tourism policy implementation areas. Such sub-committees would draw from many organizations including:

- private sector organizations such as Dominica Tourism & Hotel Association, sports associations, taxi associations, conservation association, heritage-related associations
- government – Ministry of Finance, National Development Corporation, Ministry of Tourism, Planning Unit within the Ministry of Communications, Division of Culture, Division of Forestry/Parks, Ministry of Education, Ministry of Health, Legal Affairs, Dominica Port Authority
- local government and communities

8.2.5 Tourism Action Plan

A detailed action plan has been developed to implement the Dominica 2010 Tourism Policy. Implementation on the action plan has already commenced and it will be reviewed on an annual basis for the next three years. The tourism task force will submit an annual progress report to Cabinet including recommendations for adjustments to the action plan to better meet National Tourism Policy objectives.

Glossary of Terms

Tourism Definitions Provided by the Caribbean Tourism Organization

The following Glossary of Terms for the tourism sector is provided by the Caribbean Tourism Organization (CTO) through its annual statistical data series on Caribbean tourism performance. The reader is referred to the CTO for any updates of these definitions.

Tourists - visitors staying at least 24 hours in the country visited.

Same-day - visitors staying less than 24 hours in the country visited.

- **Cruise Passengers** are regarded as a special type of same-day visitor (even if the ship overnights at the port).
- **Yacht Visitors** are included among the tourist (stay-over) or same day populations based on their length of stay.

Overnight stay - Each night that the traveller spends or is register to spend in an accommodation establishment.

Length of Stay - Obtained by dividing the number of overnight stays by the number of arrivals. This is usually calculated by country of residence of the guest and the type of accommodation.

Purpose of Visit - This classifies the major groups of in-bound, out-bound and domestic tourist into the following groups;

- Leisure, recreation and holidays (*e.g. sightseeing, shopping, attending sporting/cultural activities etc..*)
- Visiting friends and relatives
- Business and Professional
- Health Treatment (*spas, fitness, health resorts and other treatments/cures etc..*)
- Religion/pilgrimages
- Other (*aircraft/ship crew on public carriers, transit and other or unknown activities*).

Tourist Accommodation - Any facility that regularly or occasionally provides overnight accommodation for tourist. There are two basic types of tourist accommodation.

- Collective accommodation establishments (e.g. hotels and similar establishments)

- Private tourist accommodation (e.g. owned dwellings, rented rooms in family homes) and accommodation provided by friends and relatives.

Occupancy Rate - Provides information on differences in the use between various types of accommodation and when measured on a monthly basis measures the seasonal patterns in occupancy. Occupancy can be divided into.

- **Bed Occupancy** - The gross occupancy rate of bed places is calculated by dividing the hotel overnight stays by the product of bed places on offer and the number of days in the corresponding month for the same group of establishments, then multiplying the quotient by 100 to express it as a percentage.
- **Room Occupancy Rate** - For hotels and similar establishments the net rate of room occupancy is a measure of capacity utilization. It is calculated by dividing the monthly or yearly sum of occupied rooms by the number of rooms available for use, then multiplying the quotient by 100 to express it as a percentage.

Tourism Expenditure - the total consumption expenditure made by a visitor for and during his or her trip and stay at a destination. This can be broken down into;

- international and domestic tourism expenditure
- Expenditure on same-day visits
- the products to which the expenditure relates to (e.g. accommodation, meals and drinks, shopping, entertainment etc.)

Other Tourism Terms Used in this National Tourism Policy Report

In addition to these tourism indicator terms, frequently used tourism terms in this report are defined below.

Sustainable Tourism Development encompasses tourism development, management and other tourism activity which optimises the economic and societal benefits available in the present without jeopardising the potential for similar benefits in the future. (Government of South Africa, White Paper, Development and Promotion of Tourism in South Africa, 1996)

Cultural Tourism encompasses cultural activities and experiences that attract visitors and enhance their visit. Cultural tourism is about immersion in and enjoyment of the lifestyle of the local people, the local area and what gives it identity and character. (World Tourism Organization, Tourism 2020 Vision, 2001)

Community Tourism – there are many definitions of community tourism. One presented at the recent (2003) Jamaica Symposium on Community Tourism from the Shell Better Britain definition is presented below. From a policy perspective, it provides insight for policymakers seeking to incorporate community tourism as a fundamental component of their tourism strategies.

Community tourism starts from the needs of local people and the local environment. It involves the host community in planning and decision-making. It starts from the benefits which the community can derive from tourism, and defines the area's capacity for accepting visitors without causing damage. It is geared to creating jobs for local people and to underpinning (not undercutting) local businesses.

The community emphasis in this definition respects and upholds the distinctive character of places. Central to the concept is the need to consider all aspects of the local environment – its heritage, landscapes, culture and lifestyles – in a way that will both protect their integrity and promote their authenticity. Its emphasis is on developing new and positive levels of relationships and understanding between the host community and the visitor that will be beneficial to both parties.

Adventure Tourism – refers to trips undertaken by tourists seeking to engage in activities that are typically (but not necessarily) oriented to physical exertion. Adventure tourism tends to take place in remote or relatively unexplored areas.

Adventure tourism can be further defined as hard adventure or soft adventure. Hard adventure is an outdoor activity that is usually considered to be somewhat unique and exciting. It may involve a certain level of risk and require some skill on the part of the participant. Travellers usually camp or stay in remote cabins or lodges with few amenities. Examples include rock-climbing and white-water rafting.

Soft adventure is less active, may use mechanised transport and more comfortable accommodations, such as a bed and breakfast guesthouse or a resort. Typical soft adventure trips include bird watching, hiking or cycling. (World Tourism Organization, Tourism 2020 Vision, 2001)

Export Ready Tourism Product - the tourism sector is essentially an export sector. It is useful to consider the experience of other economic sectors such as manufacturing and agriculture to provide insight on the development of export ready product. In these sectors, products that do not meet international standards cannot be marketed. Some programs to develop export ready product classify enterprises using a tiered system with Tier 1 being, for example, export ready, Tier 2 being near export ready, and Tier 3 requiring significant upgrading and investment. Export ready for the tourism sector includes not only product standards but also includes "requirements" for doing business with the international travel trade. This is important for participating international marketing programs and packaging arrangements.

Export ready status is not only concerned with the quality of the product. It is also concerned with the capacity of the operator to engage in international business, to take direct reservations from customers, to take credit cards, to have adequate insurance and the like. In today's global markets, these are essential requirements to do business.

. The export ready concept is illustrated below.

Export Ready Tourism Product

